View in browser

FinancialPlanning

Retirement

September 25, 2024

By Rob Burgess
Reporter

The Federal Reserve has lowered interest rates by half a percentage point, but there are still several unanswered questions.

What is the investment mindset shift for financial advisors in an era of rate cuts?

How does it change the broader economic outlook going forward?

And what will happen with the rest of 2024's expected rate cuts?

For answers, advisors and industry experts weighed in on what the first cut means and what's ahead.

I hope you'll check it out, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Wednesday!

Connect with Rob:

FinancialPlanning
ADVISE | AI
October 9–10, 2024 | Encore Las Vegas, NV
Bringing wealth management leaders to the forefront of AI innovation
#ADVISEAI
REGISTER NOW

TOP STORIES

PRACTICE AND CLIENT MANAGEMENT

As Fed announces half-point rate drop, advisors change investment strategies

Experts expect the rate cuts to continue, but for how long and how effective they will be in achieving a "soft landing" remain to be seen.

- **Advisor strategies for optimizing cash management**
  Clients must understand that having too much of their portfolios allocated in cash can mean lower returns over time.
- **The most overlooked aspect of estate planning, and how to address it**
  Cloud-based, password-protected accounts are becoming increasingly important for advisors to discuss with clients during the planning process.

- **Ask an Advisor: What is the time frame in which you analyze an investment?**
  Getting clients to focus on a longer time frame for their investments can be challenging in the age of micro attention spans and instant gratification.
- **The top 20 technology funds of the decade**
  The broader tech sector makes up around one third of the S&P 500.

Read the latest in Retirement

SPONSOR CONTENT FROM DELOITTE

Retail investors may rely on GenAI for advice

Gen AI capabilities expected to change the mix of sources for trusted financial advice.

FINANCIAL PLANNING

You're receiving this email because you signed up for Editorial emails from Financial Planning.

To update the emails you want to receive, or to unsubscribe from our mailing list, please visit our Email Preference Center.

arizent

Arizent
One State Street Plaza, 27th Floor
New York, NY 10004

About | Subscriptions | Contact | Privacy Policy

Have questions or concerns? Contact Support

Follow us in real time: